

Historic, archived document

Do not assume content reflects current scientific knowledge, policies, or practices.

Foreign Crops and MARKETS



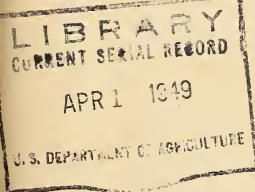
VOLUME 58

NUMBER 13

World Hog Numbers (Page 251)

World Barley and Oats (Page 255)

International Wheat Agreement (Page 250)



CONTENTS

	Page
COTTON AND OTHER FIBER	
Cotton-Price Quotations on Foreign Markets.....	275
U. K. Raw Cotton Commission Statement on Buying Difficulties.....	276
Drop in Belgian Cotton Consumption.....	278
Cotton Exports from Brazil at Low Level.....	279
U. S. Cotton Exports at Postwar Peak.....	280
FATS AND OILS	
U. S. Soybean and Soybean-Oil Exports.....	282
Indonesian Copra Exports in February Higher Than in February 1948.....	283
French Olive Oil Production Less Than Half of Postwar Average.....	284
Algeria Reports 1948-49 Olive Oil Production....	284
Lebanon Expands Oilseed Production and Processing	285
FRUITS, VEGETABLES AND NUTS	
World Sweetpotato Production Up 25 Percent.....	260
1948 World Hazelnut Production Estimate Lower...	269
GRAINS, GRAIN PRODUCTS AND FEEDS	
Review of 1948 World Barley and Oats Crops.....	255
European Winter Grain Crop Outlook.....	272
Burman Rice Stocks Decline at Ports.....	273
U. S. Rice Exports Heavy in January.....	274
LIVESTOCK AND ANIMAL PRODUCTS	
World Hog Numbers in 1949 Substantially Higher..	251
World Output of Dairy Products, Fourth Quarter 1948.	263
United Kingdom Reduces Meat Ration.....	290
TOBACCO	
Philippine Tobacco Production Increases; Foreign Trade Restricted.....	288
Spain's Tobacco Production Increases; Imports Decline.....	288
Java and Sumatra Cigar Leaf Production Higher...	289
Flue-Cured and Burley Production Increasing in Venezuela; Imports Increased.....	289

FOR RELEASE

MONDAY

MARCH 28, 1949

Issued by the OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

INTERNATIONAL WHEAT AGREEMENT NEGOTIATED

A four-year International Wheat Agreement, providing for annual trade within a fixed range of prices of approximately 456 million bushels of wheat, was opened for signature at Washington, D. C., on March 23. Participating in the final negotiations were 5 exporting countries (Australia, Canada, France, United States, and Uruguay), and 37 importing countries.

The objectives of the Agreement are to "assure supplies of wheat to importing countries and markets for wheat to exporting countries at equitable and stable prices." Basic minimum and maximum prices per bushel of wheat for the duration of the Agreement are as follows:

<u>Crop Year</u>	<u>Minimum</u>	<u>Maximum</u>
1949/50	\$ 1.50	\$ 1.80
1950/51	1.40	1.80
1951/52	1.30	1.80
1952/53	1.20	1.80

The foregoing price range applies only to that quantity of wheat (456 million bushels) moving in world trade under the terms of the Agreement.

Of the total quantity of wheat to be supplied by exporters, the United States agrees to supply 168 million bushels annually. This quantity, together with exports to the Occupied Areas of Europe and the Pacific and to miscellaneous areas outside the Agreement, would bring average annual export commitments of wheat from the United States to well over 300 million bushels.

(A brief analysis of the main provisions of the Agreement is now being prepared. This analysis, together with the text of the Agreement itself, can be obtained from the Office of Foreign Agricultural Relations, U. S. Department of Agriculture, Washington 25, D. C.)

L A T E N E W S

According to information received from Sicily, a severe snowstorm early this month destroyed an estimated 60 percent of the unharvested citrus fruits.

(Continued on Page 291)

FOREIGN CROPS AND MARKETS

Published weekly to inform producers, processors, distributors and consumers of farm products of current developments abroad in the crop and livestock industries, foreign trends in prices and consumption of farm products, and world agricultural trade. Circulation of this periodical is free, but restricted to those needing the information it contains for the conduct of their production, marketing, educational, news dissemination and other related activities. Issued by the Office of Foreign Agricultural Relations of the United States Department of Agriculture, Washington 25, D. C.

WORLD HOG NUMBERS IN 1949 SUBSTANTIALLY HIGHER 1/

World hog numbers at the beginning of 1949, according to the Office of Foreign Agricultural Relations, are estimated at about 261 million head, compared with approximately 246 million in 1948, an increase of 15 million or more than 6 percent above last year. Signs in early 1948 of favorable feed grain harvests and strong demands for pork and pork products induced hog breeders to make plans to step up breedings, and these are reflected in higher numbers this year.

Significant increases in hog numbers occurred on all the Continents of the world during 1948. The largest increases took place in the war-devastated Continents of Europe and the Soviet Union. South America also made a sizable gain in numbers, while moderate increases occurred on the other Continents. World numbers made a substantial recovery in 1948 and further recovery can be anticipated in 1949 if growing and economic conditions remain favorable.

Notwithstanding substantial increases during the past year, hog numbers on several Continents continued below prewar levels. The world hog numbers are below the 1936-40 prewar average by 29 million head, or more than 10 percent. North America, South America and Africa were the only Continents where numbers exceeded the prewar average. On the other hand, European numbers, at the beginning of 1949, were about 75 percent of prewar and the Soviet Union numbers were believed to be somewhere near one-half of their prewar level. Numbers in Asia and Oceania continue to be about 9 and 6 percent, respectively, below prewar levels.

Favorable growing conditions throughout most of the world in 1948 resulted in a much improved feed situation which contributed to the general recovery of hog numbers. Such factors as the strong domestic and export demand for pork and pork products, efforts to regain self-sufficiency and to be less dependent on imports, and Government plans by some countries were important in increasing hog numbers in many areas.

The 4 percent increase in hog numbers on farms on January 1, 1949, in the United States reflected the favorable feed prospects and high prices for hogs that existed in much of 1948. Canadian numbers in December 1948, according to reports, were 14 percent below the preceding year, but breeding intentions indicate that the 1949 spring pig crop can be expected to be 20 percent larger than last spring.

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

HOS: Numbers in specified countries,
averages 1931-35 and 1936-40, annual 1944-49

Continent and country	Month of estimate	Average		1944	1945	1946	1947	1948 2/	1949 2/
		1931-35	1936-40						
		Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
North America									
Canada	Dec. 1 1/	3/	3,906/	4,078/	9,473/	7,636/	5,853/	5,459/	5,381/
El Salvador	July	355/	355/	559/	573/	382/	-	283/	-
Guatemala	July	102/	102/	200/	200/	-	-	-	374/
Honduras	July	384/	384/	235/	258/	-	318/	-	-
Mexico	Dec. 1 1/	3,686 1/5/	4,865/	5,255/	5,329/	5,329/	5,309/	5,314/	-
Nicaragua	July	4,000 1/	4,000 1/	225/	225/	-	-	-	250/
United States	Jan. 1	54,790/	46,356/	83,741/	59,331/	61,301/	56,921/	55,028/	57,139/
Cuba	Dec. 31 1/	66,794/	908/	-	1,620/	-	-	1,700/	-
Estimated total		66,200/	61,300/	102,400/	76,400/	76,400/	72,100/	70,200/	71,700/
Europe									
Austria	Dec. 1 1/	2,823 1/	2,849/	1,872/	1,697 1/2/	1,030 1/2/	1,490 1/2/	1,724 1/2/	1,618/
Belgium	Jan. 1	1,268 1/	1,005 1/2/	485 1/2/	635 1/2/	735 1/2/	776 1/2/	648/	912/
Bulgaria 9/	Dec. 31 1/	902 1/	833/	700/	800/	800/	870/	825/	-
Czechoslovakia 11/	Jan. 1	4,316/	2,997/	3,174/	3,256/	3,097/	2,462/	2,944/	3,242/
Denmark	Jan.	1,064/	2,997/	2,291 1/	1,819 1/12/	1,810 1/12/	1,887 1/12/	1,604 1/12/	1,944/
Eire	June	6,606/	978/	381/	426/	479/	457/	457/	-
Finland	June	460 113/	485/	364/	229/	254/	335/	304/	-
France	Mar. 1	6,606/	7,034 1/8/	4,204 1/8/	4,060 1/8/	4,386 1/8/	5,335 1/8/	5,678 1/8/	6,418/
Germany 14/	Dec. 1 1/	464 1/2/	18,721/	13,029/	-	-	400/	2,499/	-
Greece	Dec. 31 1/	2,531/	532/	-	300/	330/	2,119/	2,400/	-
Hungary	Spring	196/	3,620/	1,114 1/2/	1,114 1/2/	1,315/	3,500/	3,500/	-
Italy	July	3,262 1/	3,095/	3,036/	3,036/	3,000/	3,500/	3,500/	-
Luxembourg	Dec. 1 1/	2,223/	1,725/	100/	88/	95/	1,062/	1,100/	106/
Netherlands	Dec. 1	400/	393/	846/	981/	981/	1,062/	937/	1,158/
Norway	June 20	400/	393/	220/	195/	257/	259/	248/	-
Poland 15/	June 30	1,206 10/	9,684/	1,200/	1,100/	4,000/	-	-	-
Portugal	Dec. 31 1/	2,431 11/	2,431/	1,200/	1,100/	1,389/	1,384/	1,200/	-
Rumania 16/	Dec. 31 1/	5,097 11/	4,944/	1,100/	1,100/	4,676/	1,459/	1,459/	-
Spain	Dec. 31 1/	1,492/	1,292/	1,054/	1,079/	1,166/	1,182/	1,194/	-
Sweden	Summer	971/	915/	600/	698/	654/	710/	767/	-
Switzerland	April	3,739/	4,380/	1,867/	1,867/	1,959/	2,150/	2,150/	-
United Kingdom	June	2,874/	3,238/	4,380/	4,380/	4,380/	4,380/	4,380/	-
Yugoslavia	Dec. 31 1/	80,000/	75,700/	52,200/	48,200/	42,900/	49,000/	51,100/	-
Estimated total		80,000/	75,700/	52,200/	48,200/	42,900/	49,000/	51,100/	-
Soviet Union 15/									
	Jan. 1	-	32,300/	-	-	10,400/	8,600/	-	-

Lack of export outlets and high labor costs in Argentina during 1948 led to the lowest number of hogs in 30 years, but increases in the preferential exchange rate for pork and lard, and a favorable hog-corn price relationship can be expected to reverse the trend. In Brazil a favorable feed situation, coupled with a strong domestic demand, have resulted in an upturn in the trend of hog numbers.

Hog numbers in Denmark reached their lowest level in several years early in 1948, but a good harvest, higher export prices for bacon and ECA assistance have materially aided recovery. The United Kingdom reported a substantial recovery in numbers during 1948 and there is indication of a further increase in 1949. With numbers less than half of prewar in Eire, the recovery can be expected to be slow, even with ECA assistance and an improved feed situation. In France, numbers are expected to continue the upward trend in 1949. Numbers in Poland can be expected to continue to increase because of special Government inducements to producers.

Reliable data on the Balkan countries in the satellite areas and the Soviet Union are lacking, but generally, the upward trend can be expected to continue because of the improved feed situation and predetermined plans for increasing production.

Scarcity of feed in New Zealand may limit any increase in 1949 hog numbers and the high cost of grain in relation to the economical returns derived from hogs in Australia may preclude any increase in numbers this year.

This is one of a series of regularly scheduled reports on world agricultural production, approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Elmer A. Reese, Hazel B. Kefauver, Stanley Mehr and Mary E. Long.

REVIEW OF 1948 WORLD BARLEY AND OATS CROPS

Latest revised estimates place the 1948 world production of barley at 2,395 million bushels and of oats at 4,230 million, according to the latest information available to the Office of Foreign Agricultural Relations. Production of the two crops combined, thus would be 125 million short tons, only slightly below the 1935-39 average. It is, however, more than 10 percent above the 1947 harvest.

The greater part of the net gain over 1947 took place in North America and Europe. Increases in these areas were especially significant for oats, with an increase of about 560 million bushels or 20 percent over the 1947 estimates noted. Somewhat higher yields were reported for both areas in 1948, with some increase in the acreage of oats harvested in North America. European acreage of both barley and oats was below the 1947 figure.

While there was little net change from the 1935-39 world production, significant shifts are noted within the areas. The increase in barley production in North America more than offsets reductions in the Soviet Union and Europe. For oats, however, the gain of about 470 million bushels in North America was not as great as the reduction in Europe and the Soviet Union.

In North America the 1948 crop of barley and oats, together, amounted to 41 million short tons, an increase of more than a third compared with the 1935-39 period. An increase of 20 percent over the 1947 harvest is also shown. The favorable position of this area is largely due to the good outturns in the United States. The near-record production of 1,492 million bushels of oats in this country was about 300 million bushels larger than the 1947 outturn and roughly 450 million bushels above the prewar average. Both the harvested acreage and yields were substantially above average. The production of oats in Canada was 359 million bushels, or slightly above average, as a result of high yields. Acreage was somewhat below average.

Barley production in the United States was 317 million bushels, about a third above average, with both acreage and yields well above average. Canada's barley outturn of 155 million bushels was about 75 percent above the average and acreage about 50 percent larger than in 1935-39.

Production of barley in Europe, as estimated at 645 million bushels, was only slightly below average, and about 15 percent larger than the small 1947 harvest. The acreage was smaller than in 1947, but yields were generally more favorable. The outturn of 1,380 million bushels of oats was about 15 percent below average but 15 percent larger than the small crop in 1947.

(Text continued on Page 260; tables follow)

BARLEY: Acreage, yield per acre, and production in specified countries,
year of harvest, average 1935-39, annual 1946-48 1/

Continent and country	Acreage 2/			Yield per acre 3/			Production		
	Average : 1935-39 : 1,000 : acres :	1946 : 1,000 : acres :	1947 : 1,000 : acres :	Average : 1935-39 : 1,000 : acres :	1946 : 1,000 : acres :	1947 : 1,000 : acres :	Average : 1935-39 : bushels : 1,000 : bushels :	1946 : 1,000 : bushels :	1947 : 1,000 : bushels :
NORTH AMERICA									
Canada.....	4,291 : 374 :	6,258 : 423 :	7,465 : 423 :	20.7 : 41.8 :	23.8 : 41.8 :	18.9 : 35.6 :	88,882 : 3,960 :	148,887 : 5,461 :	141,372 : 5,512 :
Mexico.....	10,817 : 15,490 :	10,411 : 17,090 :	11,014 : 18,900 :	22.1 : 18,960 :	25.2 : 18,960 :	25.5 : 18,960 :	238,622 : 332,000 :	262,258 : 417,000 :	281,185 : 248,000 :
United States.....	10,817 : 15,490 :	10,411 : 17,090 :	11,014 : 18,900 :	22.1 : 18,960 :	25.2 : 18,960 :	25.5 : 18,960 :	238,622 : 332,000 :	262,258 : 417,000 :	281,185 : 248,000 :
Estimated total 5/.....	15,490 : 15,490 :	17,090 : 17,090 :	18,900 : 18,900 :	22.1 : 18,960 :	25.2 : 18,960 :	25.5 : 18,960 :	332,000 : 332,000 :	417,000 : 417,000 :	248,000 : 248,000 :
EUROPE									
Austria.....	401 : 74 :	310 : 170 :	300 : 237 :	285 : 210 :	20.0 : 47.6 :	20.7 : 42.2 :	13,087 : 3,570 :	6,200 : 8,100 :	6,200 : 10,000 :
Bulgaria.....	676 : 1,600 :	544 : 1,450 :	725 : 1,450 :	24.7 : 1,450 :	23.5 : 28.2 :	16.6 : 28.2 :	17,400 : 51,800 :	13,000 : 40,000 :	12,000 : 40,000 :
Czechoslovakia.....	676 : 1,600 :	544 : 1,450 :	725 : 1,450 :	24.7 : 1,450 :	23.5 : 28.2 :	16.6 : 28.2 :	17,400 : 51,800 :	13,000 : 40,000 :	12,000 : 40,000 :
Denmark.....	118 : 1,106 :	1,038 : 1,106 :	1,122 : 1,106 :	1,096 : 1,120 :	63.1 : 63.1 :	53.0 : 63.1 :	61.1 : 52,881 :	61,696 : 6,000 :	61,040 : 6,000 :
Eire.....	280 : 1,837 :	345 : 1,807 :	341 : 2,567 :	326 : 2,567 :	23.2 : 27.0 :	22.6 : 27.0 :	54.2 : 28.8 :	5,413 : 48,803 :	6,200 : 55,000 :
Finland.....	1,837 : 3,120 :	1,807 : 4,050 :	2,567 : 4,050 :	2,567 : 4,050 :	27.0 : 17.0 :	23.2 : 17.0 :	53,015 : 9,267 :	48,803 : 6,200 :	55,000 : 6,200 :
Germany.....	511 : 1,163 :	494 : 1,275 :	494 : 1,300 :	488 : 1,300 :	18.1 : 15.9 :	17.0 : 15.9 :	13,087 : 30,178 :	6,200 : 20,267 :	6,200 : 22,000 :
Greece.....	1,163 : 4,480 :	1,275 : 5,871 :	1,300 : 5,871 :	1,300 : 5,871 :	15.9 : 18.0 :	16.9 : 18.0 :	30,178 : 40,182 :	20,267 : 10,553 :	22,000 : 8,600 :
Hungary.....	480 : 1,071 :	587 : 1,071 :	600 : 1,071 :	620 : 1,071 :	21.2 : 22.9 :	14.5 : 22.9 :	17,766 : 5,934 :	10,553 : 8,100 :	11,000 : 6,500 :
Italy.....	107 : 143 :	155 : 103 :	169 : 103 :	132 : 100 :	52.9 : 43.1 :	48.4 : 43.1 :	5,934 : 3,467 :	8,100 : 4,514 :	6,500 : 4,100 :
Netherlands.....	2,570 : 1,760 :	316 : 343 :	343 : 343 :	320 : 320 :	29.6 : 15.1 :	29.6 : 15.1 :	76,000 : 1,783 :	4,514 : 4,778 :	4,000 : 2,930 :
Norway.....	2,570 : 1,760 :	316 : 343 :	343 : 343 :	320 : 320 :	29.6 : 15.1 :	29.6 : 15.1 :	76,000 : 1,783 :	4,514 : 4,778 :	4,000 : 2,930 :
Poland.....	1,760 : 2,030 :	316 : 3,674 :	343 : 3,674 :	320 : 3,674 :	15.1 : 13.8 :	8.5 : 13.8 :	1,783 : 28,000 :	4,778 : 28,000 :	2,930 : 70,000 :
Portugal.....	2,030 : 4,509 :	3,674 : 4,509 :	3,674 : 4,509 :	3,674 : 4,509 :	21.3 : 39.5 :	18.3 : 39.5 :	20,911 : 9,951 :	37,059 : 8,394 :	87,876 : 8,082 :
Romania.....	292 : 13 :	221 : 75 :	247 : 67 :	217 : 59 :	36.0 : 33.1 :	32.7 : 33.1 :	9,951 : 37.9 : 45.2 :	8,394 : 2,930 : 91,625 :	8,082 : 2,522 : 75,530 :
Sweden.....	13 : 934 :	75 : 2,211 :	67 : 2,060 :	59 : 2,060 :	33.1 : 18.0 :	33.1 : 18.0 :	37.9 : 36,596 : 18,800 :	2,930 : 91,625 : 18,800 :	2,522 : 75,530 : 18,800 :
Switzerland.....	934 : 2,211 :	2,211 : 2,060 :	2,060 : 2,060 :	2,060 : 2,060 :	18.0 : 16.0 :	15.1 : 16.0 :	36,596 : 665,000 :	91,625 : 585,000 :	75,530 : 55,000 :
Yugoslavia.....	2,211 : 23,110 :	2,060 : 23,110 :	2,060 : 23,110 :	2,060 : 23,110 :	18.0 : 16.0 :	15.1 : 16.0 :	18,800 : 665,000 :	18,800 : 585,000 :	18,800 : 55,000 :
Estimated total 5/.....	23,110 : 26,600 :	23,110 : 19,500 :	23,110 : 20,500 :	23,110 : 21,500 :	16.0 : 11.0 :	15.1 : 11.0 :	665,000 : 425,000 :	585,000 : 215,000 :	55,000 : 310,000 :
U.S.S.R. (Europe and Asia).....	26,600 : 26,600 :	19,500 : 19,500 :	20,500 : 20,500 :	21,500 : 21,500 :	11.0 : 16.0 :	15.1 : 16.0 :	425,000 : 425,000 :	215,000 : 215,000 :	310,000 : 310,000 :

[illegible]

1/ Years shown refer to years of harvest in the Northern Hemisphere. Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow; thus, the crop harvested in the Northern Hemisphere in 1935 is combined with preliminary forecasts for 1936. 2/ Figures refer to harvested areas as far as possible. 3/ Yield per acre calculated from acreage and production data shown, except for incomplete periods. 4/ Revised estimates for Northern Hemisphere countries; for Southern Hemisphere, revised preliminary forecasts. 5/ Production and yield reported in bushels of 34 pounds. 6/ Estimated totals which in the case of production are rounded to millions, include allowances for any missing data for countries shown and for other producing countries not shown. 7/ Average of less than 5 years. 8/ Figure for 1935 only. 9/ Includes estimate for Lebanon, and is, therefore, not strictly comparable with estimates shown for other years.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service officers, results of office research, or other information. Preliminary estimates for countries having changed boundaries have been adjusted to conform to present boundaries.

The barley crop in the Soviet Union was estimated at 320 million bushels, only about 75 percent of the prewar level, mainly because of a shift from coarse grains to breadgrains. Average yields were indicated to be a little below the 1935-39 average. Production of oats was estimated at 780 million bushels, compared with the prewar average of 1,165 million. The indicated acreage shift was larger than for barley. Yields were estimated to be smaller than in 1947 as well as below the 1935-39 average.

Production of barley in Asia was slightly below the prewar level though acreage showed a slight increase. Production of oats is not important in this area, and the 1948 crop was about average.

In Africa both barley and oats crops were above average and considerably larger than the small 1947 harvest.

Production in South America is indicated to be above average for barley, but below average for oats. Official estimates are not yet available for Argentina, the principal producer of these grains in the area. On the basis of the best available information, the barley acreage in that country is still considerably above the 1935-39 level, while the oats acreage is below that period.

In Oceania production of both barley and oats is well above average, though not up to the large 1947 production.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Robert L. Gastineau, Judith E. Downey, Eric Shearer, and Constance H. Farnworth.

WORLD SWEETPOTATO PRODUCTION UP 25 PERCENT 1/

Sweetpotato production in 1948-49 is estimated at about one and one-half billion bushels of 55 pounds in 29 countries. This is 286 million bushels or 24 percent more than the prewar production of 1.2 billion bushels. It is 68 million bushels larger than the 1947-48 production but 42 million bushels smaller than the 1946-47 production. These total figures include rough estimates for a number of countries from which reports are not available for all years.

While the general trend of world production has been sharply upward, this has not been true in all areas. Substantial increases are indicated for Asia and South America where the increases above prewar were 30 and 26 percent respectively, but the trend is downward from prewar in North America by 24 percent and in Spain by 20 percent. Spain is the only country in Europe reporting the production of sweetpotatoes. Insufficient data are available from Africa to properly evaluate the trend of sweetpotato production on that Continent.

1/ For a few countries yams are included.

Continent and country	Acreage			Yield per acre			Production (bushels of 55 pounds)		
	Prewar average	1946	1947	Prewar average	1946	1947	Prewar average	1946	1947
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America									
(*) Barbados.....	12	9	10	1142	153	140	1,700	1,300	1,577
Cuba.....	120	90	100	95	100	109	105	12,000	9,000
Dominican Republic.....	140	95	104	121	33	36	4,552	3,410	2,738
Haiti.....	65	50	50	70	76	60	73	4,600	3,006
(*) Jamaica.....	90	65	75	200	208	160	171	18,036	13,500
(*) Puerto Rico.....	68	95	100	53	46	45	45	3,600	4,775
Mexico.....	18	28	30	89	90	89	87	1,958	2,526
United States.....	400	518	524	518	93	94	97	67,900	66,424
Total.....	1,133	1,103	1,201	590	57	58	38	113,368	103,350
Europe									
Spain.....	31	30	26	257	250	246	247	7,960	7,500
Asia									
Ceylon.....	20	27	27	28	28	26	28	560	760
(*) China.....	5,794	7,643	7,594	7,643	126	126	126	712,561	965,479
(*) French Indo China.....	271	350	325	350	35	37	38	10,499	13,000
(*) Japan.....	618	921	875	900	203	240	211	125,609	221,027
Southern Korea.....	38	96	91	106	120	68	113	10,553	11,300
(*) Malaya.....	12	22	22	42	36	36	38	300	800
(*) Netherlands Indies 5/.....	535	580	650	600	122	91	94	65,200	52,700
(*) Philippines.....	400	690	690	700	41	32	37	16,300	21,000
(*) Ryukyu.....	60	80	75	51	200	227	222	12,000	20,000
Total.....	7,448	10,374	10,309	10,404	126	125	122	977,785	1,301,313
South America									
Argentina.....	100	83	91	90	102	131	167	10,196	15,495
(*) Bolivia.....	5	6	6	35	33	33	33	1,171	200
Brazil.....	240	281	306	300	136	132	150	32,606	37,040
Paraguay.....	20	10	20	20	217	332	200	4,334	4,008
Peru.....	38	38	38	39	106	101	105	3,876	4,010
Uruguay.....	23	26	23	25	69	76	72	1,582	1,974
Total.....	426	449	484	480	140	140	140	52,771	62,387
Africa									
Belgian Congo.....	130	129	113	50	50	53	53	6,500	6,000
(*) French West Africa.....	472	470	470	45	47	47	47	21,405	22,000
(*) Madagascar.....	302	300	300	48	59	60	60	14,385	17,637
(*) Mauritius.....	12	15	15	6	5	5	5	75	80
(*) Union of South Africa.....	19	20	20	84	80	80	80	1,533	1,600
Total.....	935	934	918	918	47	51	52	43,961	47,680
Total 29 countries.....	10,453	12,890	12,798	12,618	115	118	116	1,161,196	1,523,553

1/ This table is intended for information purposes only. About half of the figures for 14 of the countries listed are office estimates rather than estimates sent in from U.S. foreign service posts. Such countries are designated with an (*). Production in these countries however, represents only a portion of the total crop so that including them does not materially affect the representativeness of the totals. 2/ Years shown indicate year of harvest in the Western Hemisphere. 3/ The 5-year 1939-59 average was used when available. 4/ Preliminary. 5/ Includes 4 islands, Java, Madura, Bali and Lombok. Sumatra excluded but reported 31.6 million bushels produced in 1950.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of the United States Foreign Service officers, and other information. Data relate to prewar boundaries, unless otherwise noted. Totals include estimates for countries for which official statistics are unavailable.

Asia: The bulk of the world's sweetpotatoes are produced in the Far East. China, Japan and Indonesia are the world's largest producing countries. Together they produced 1.2 billion bushels, or about 80 percent of the estimated total crop of almost 1.5 billion bushels in 1948-49. China alone (in 22 provinces) produced 963 million bushels or 65 percent of the total. The Chinese crop was 5 times as large as the Japanese crop of 190 million bushels, and the Japanese crop was almost three and a half times the amount reported from Indonesia. However, the estimates for the latter do not include all the Islands of Indonesia.

Production and acreage of sweetpotatoes has increased in the Far East by 30 and 35 percent respectively since prewar. The 1948 crop for the 8 reporting countries in Asia is estimated at almost 1.3 billion bushels. In 1947 it was 1.2 billion compared with 1.3 in 1946 and less than 1.0 billion prewar. One of the most significant increases among the Asiatic countries occurred in Southern Korea, (the U.S. Zone). There the 1948 crop was estimated at 11 million bushels which was more than double the prewar production of 4.6 million bushels. A significant increase occurred also in Japan where the 1946 crop was estimated at 221 million bushels compared to 125 million in prewar--an increase of 75 percent. The 1947 crop declined 20 percent from the large 1946 crop to 177 million bushels but still it was 40 percent above prewar. The 1948 crop in Japan has not been officially reported. In China, the 1948 crop of 963 million bushels was only slightly less than the 1946 crop of 965 million bushels, was 7 percent above the 1947 crop of 900 million bushels and 30 percent larger than the prewar crop of 742 million bushels. On the other hand, in the 4 reporting Islands of Indonesia sweetpotato production declined in 1948 to 57 million from a prewar average of 65 million--a decline of 12 percent.

North America: In North America the trend of sweetpotato production has been steadily downward. For the 8 North American countries reporting sweetpotatoes, production has declined from 114 million bushels in the prewar period 1935-39 to 104 million bushels in 1946, to 93 million bushels in 1947 to 87 million bushels in 1948 or 24 percent below the prewar level. Almost 60 percent of the 1948 crop reported for North America was produced in the United States.

The United States crop in 1948 was reported at 50 million bushels, or 26 percent below the prewar 1935-39 average of 68 million bushels. The 1947 crop was 18 percent below prewar and the 1946 crop 2 percent below. Mexico, on the other hand, while only a minor producer, shows a marked increase in sweetpotato production. The 1948 crop was estimated at 2.6 million bushels as compared to 1.6 million bushels prewar. This is an increase of more than 60 percent.

South America: Production in the 6 reporting South American countries has increased on the whole almost as rapidly as in the Asiatic countries, but it is of far less importance because of the much smaller volume. The 1947-48 crop (the latest on which final reports are available) was reported at 67 million bushels or 26 percent above prewar production of 53 million bushels. It was 6 percent above the 1946-47 crop of 63 million bushels. Of the total of 67 million bushels produced in the 6 reporting South American countries in 1947-48, Brazil produced 42 million and Argentina 15 million. Together these 2 countries produced 85 percent of the South American crop in that season.

WORLD OUTPUT OF DAIRY PRODUCTS, FOURTH QUARTER 1948 1/

The output of manufactured dairy products in a number of principal producing countries showed a marked increase in the October-December quarter of 1948 over the corresponding quarter of 1947. While in some countries part of the added output was due to an increase in the total milk production, a considerable amount is attributed to a shift in the utilization of milk. By late 1948, rationing and other quantitative restrictions on milk use had largely disappeared, with the result that milk supplies went largely to the most profitable uses. As prices of fluid milk and cream had generally risen, the controlling factor on such uses shifted from quantitative restrictions to limitations related to the ability or willingness of consumers to pay the prices for fluid milk and cream. Increased availability of other foods, and some lowering of prices also affected consumer choice.

Milk diverted to manufactured products was utilized somewhat differently in the various countries, depending upon price patterns. With relatively high world prices for evaporated and condensed milk, Canada, Denmark, France, Netherlands, and the United Kingdom found this a profitable outlet. In the United States relatively high stocks of these commodities kept production down.

Milk production in the final quarter of 1948, as in the July-September quarter, equalled or exceeded that for the same period a year earlier in nearly all important dairy countries. Total milk output was about 20 percent higher in Denmark and the United Kingdom and commercialized deliveries only were nearly 50 percent higher in France and the Netherlands. As a result of the mild weather during the winter months and the favorable feed situation in Europe and North America, milk production is continuing at relatively high seasonal levels.

Butter production in the fourth quarter of 1948 showed an overall increase of 9 percent when compared with the corresponding quarter of 1947. Higher output was reported in all of the major-producing countries of the world, with the exception of Australia, where production declined to 98 percent of the same quarter a year earlier. However, production for the year as a whole was 4 percent higher than for 1947, and represented the largest output of butter since 1943. In New Zealand, butter gradings-for-export in the last quarter of 1948 were only 1 percent above a year earlier. This increase and a slightly

1/ Prepared by Floyd E. Davis and Regina M. Murray, and based largely on reports from U. S. Foreign Service Offices.

DAIRY PRODUCTS: Output in principal producing and exporting countries,
4th quarter (calendar) 1948, with comparisons

Country and product	Average 1934-38	Total 1947	Total 1948	1947		1948		3rd quarter	4th quarter	4th quarter 1948/1947
				1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds			
Butter 1/										
Canada.....	248,119 1/2	290,824	283,731	52,368 1/2	28,367	53,531	109,488	152,345	100	
United States.....	1,673,328 1/2	1,329,678	1,214,400 1/2	237,978 1/2	246,415 1/2	374,930 1/2	339,695	256,400	108	
Belgium.....	46,179 1/2	54,937	66,000 1/2	10,498 1/2	10,498	18,782	72,311	63,493	109	
Denmark.....	400,660	276,637	267,199 1/2	58,422	53,572	77,823	14,748	14,748	108	
Eire.....	89,400	127,984	63,900	13,289	26,808	56,246	61,556	56,996	170	
France.....	444,888	187,195	203,606	33,618	18,973	48,356	53,696	34,838	158	
Germany.....	792,000	115,642	155,865	22,021	3,395	7,187	5,185	5,185	123	
Netherlands.....	201,000	17,598	17,598	4,190	41,242	54,813	56,010	56,010	104	
Norway.....	24,930	209,340	209,340	7,658	5,933	7,507	8,666	8,666	100	
Switzerland.....	62,170	32,628	18,772	1,837	1,752	7,437	5,690	5,690	210	
United Kingdom.....	44,200	15,442	18,772	33,457	35,864	24,865	8,263	8,263	98	
Argentina.....	65,742	112,700	394,834	11,369	17,054 1/2	58,359 1/2	70,934	121,907	101	
Union of South Africa.....	27,725	32,642	340,677	123,747 1/2	104,264 1/2	58,359 1/2	58,359	58,359	101	
Australia.....	337,032 1/2	340,677	354,834 1/2	146,138	103,600	22,234	47,633	139,408	101	
New Zealand.....	366,049 1/2	341,109	354,834 1/2	146,138	103,600	22,234	47,633	139,408	101	
Export gradings.....	314,753	304,347	300,537	137,453	91,582	22,234	47,633	139,408	101	
Cheese 10/										
Canada.....	114,699 1/2	119,765	86,595	15,925 1/2	3,746	30,946	41,676	10,138	65	
United States.....	643,234 1/2	1,177,669	1,097,765 1/2	201,064 1/2	202,590 1/2	350,300 1/2	310,210	221,645	110	
Denmark.....	68,820 1/2	99,207	123,236 1/2	17,417 1/2	16,755	31,226	38,580	26,675	153	
France.....	363,098 1/5	244,623	313,840	14,140	40,598	93,462	59,159	84,661	206	
Italy 11/.....	253,518	434,174 1/2	441,000	28,122	16,045	68,999	75,490	15,159	159	
Netherlands 13/.....	266,549 1/2	141,857	141,857	28,122	33,886	12,489	9,093	9,093	123	
Norway.....	39,067	24,259	24,259	2,701	23,995	36,281	36,193	36,193	362	
Sweden.....	111,729	105,137	86,299	17,362	12,336	30,432	24,416	10,538	102	
Switzerland.....	109,000	36,916	59,450	19,960	6,586	17,920 1/2	24,416	3,946	102	
United Kingdom 13/.....	67,873	194,481	194,481	61,006 1/2	6,087 1/2	45,687	21,903	38,326	108	
Argentina.....	10,195	17,619	93,417	37,511	21,721	11,467	21,903	17,644	108	
Union of South Africa.....	49,111 1/2	96,655	205,093	82,278	64,531	23,108	89,461	89,461	108	
Australia.....	201,272	205,093	194,744	83,050	64,531	23,108	89,461	89,461	108	
New Zealand.....	194,175 1/2	195,446	194,744	83,050	64,531	23,108	89,461	89,461	108	
Export gradings.....	194,175 1/2	195,446	194,744	83,050	64,531	23,108	89,461	89,461	108	

DAIRY PRODUCTS: Output in principal producing and exporting countries, 4th quarter (calendar) 1948, with comparisons

Country and product	Average 1934-38	Total 1947	Total 1948	1947				1948				4th quarter 1948/1947
				1,000 pounds	1947	1st quarter	2nd quarter	3rd quarter	4th quarter	1,000 pounds	Percent	
Canned milk												
Canada 1/	92,377 2/	249,318	294,185	46,384 2/	35,025	98,059	105,452	105,452	55,649	120		
United States 11/	2,469,535 2/	4,575,726	4,515,485 2/	741,578 2/	863,215 2/	1,575,930 2/	1,575,930 2/	1,575,930 2/	725,115	98		
China	32,564	31,362	38,763	7,971	4,338 4	9,453	14,131	15,293	11,287	191		
Denmark	40,785	38,763	53,405	8,794	4,305	17,819	14,143	36,253	46,738	269		
France	28,953	45,086	136,905	5,922	9,771	24,909 2/	39,604	27,202	53,494	103		
Netherlands	304,896	79,562	187,175	17,363	4,171	2,743	2,743	2,743	30,822	201		
Switzerland	14,198 2/	15,330	133,362 2/	2,840	52,033 2/	36,353 2/	16,353	27,202	53,494	103		
United Kingdom	378,560	131,174	133,362 2/	15,322	11,862 2/	7,704	28,840	28,840	16,757	141		
Argentina	17,642	12,642	83,719	4,610	117,347 2/	166,260 2/	304,435 2/	210,830	149,370	128		
Australia	11,273 11/	124,685	831,495 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
New Zealand 18/	23,488 2/	69,963	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
Canada	23,488 2/	69,963	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
United States	203,555 2/	842,829	831,495 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
Belgium	5,500	5,509	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
Denmark	2,205	11,393	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
France	7,685	2,621	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
Netherlands	56,438	34,791	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
Sweden	1,351	23,382	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
Switzerland	2,381	5,693	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
United Kingdom	33,600	55,372	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
Argentina	19/	17,637	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
Australia	1/	16,971 2/	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
New Zealand	23/	17,429 11/	4,515,485 2/	117,347 2/	1,570	1,645	4,365	3,243	4,979	139		
1/ Creamery butter. 2/ Revised. 3/ These figures represent controlled production of butter. 4/ Total production. 5/ Less than a 5-year average.												
6/ Based on October and November production. 7/ Production year beginning July 1. 8/ Production year beginning April 1. 9/ Marketing year beginning August 1. 10/ Factory cheese. 11/ Total cheese, and includes cheese made from concentrated milk. 12/ Estimated. 13/ Including milk from cheese.												
14/ Both bulk and case goods. 15/ For 1937 only. 16/ Revised to include concentrated milk. 17/ Condensed milk reported as at 55,924,000 pounds for 1947. 18/ Total dried-whole and dried-skin milk for human consumption. 19/ Quantity small. 20/ Includes infantile food, health beverages, etc.												
21/ Production of dried-whole and dried-skin milk was 44,983,000 pounds in 1947. 22/ Production of dried-whole and dried-skin milk was 49,638,000 pounds in 1948. 23/ For 1938 only.												

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics, United States Foreign Service Reports, and other information.

higher one in the third quarter were not sufficient to offset the decline in output of the first 6 months, with the result that total production for 1948 in New Zealand dropped 1 percent below the level of the previous year.

Among the continental countries reporting, the largest increase in butter output in the final quarter of 1948 occurred in France. Production there was 70 percent higher than in the final period of 1947, largely the result of the improvement in supplies of commercialized milk which took place in these months. Although output of butter in the first half of the year was disappointing, France's production for the entire year showed a gain of approximately 9 percent over 1947. In the Netherlands also, more milk for manufacturing purposes became available in the fourth quarter of 1948, and the output of butter in this period ran 58 percent above that of a year earlier, while annual production was up 35 percent over 1947.

The improvement in Denmark's dairy situation in the last months of 1948 was reflected in an increase of 9 percent in butter manufactured in the final quarter of the year. However, this increased production was not sufficient to outweigh the low output of the first half of 1948, and production for the year as a whole was 3 percent below that for the preceding 12 months.

In Canada, fourth quarter production was maintained at approximately the same level as that of the fourth quarter a year earlier. For the greater part of 1948, monthly butter production was below the corresponding period of 1947, and output for the entire year showed a decline of about 3 percent in comparison with the previous year. During the October-December quarter, butter production in the United States registered an increase for the first time in 1948, output running 8 percent above the same quarter of 1947. For the entire 12 months, production was 9 percent less than 1947, and with the exception of 1946, was the lowest annual output since 1922. The United Kingdom and Eire also reported increased butter production, both for the final quarter of 1948 and for the entire year.

Cheese production increased in most countries in the fourth quarter of 1948. Overall output in this period was 21 percent above the same 3 months' period of 1947. Of the Southern Hemisphere countries, figures are available at this time for Australia and New Zealand only. Cheese production in the former country in the quarter under review increased 2 percent over the same quarter a year earlier, but for the entire year production decreased 3 percent. In New Zealand, cheese gradings-for-export in the final quarter of 1948 were 8 percent higher, while output for the year as a whole almost approximated 1947 production, being less than 1 percent below the earlier year.

In France, the improved supply situation existing in the closing months of the year was reflected in increased output, cheese production in the final quarter of 1948 exceeding that of the same quarter of 1947 by 106 percent. For the year just ended, output was 28 percent above that for the previous year. Conditions for dairy production in Denmark were more favorable in the last few months of 1948, and in the last 3 months of the year, cheese production increased 53 percent. For the entire 12 months, output increased 24 percent over 1947.

Production of cheese in the United States in the fourth quarter of 1948 was 10 percent higher than that of the corresponding quarter of 1947. However, total 1948 production lagged behind 1947 by approximately 7 percent. This drop was accounted for in the 8 percent decline in American cheese, which makes up the greater part of cheese manufactured in this country.

Canada was the only country among the more important dairy manufacturing countries in which cheese production in the fourth quarter of 1948 fell below the similar period of 1947. This also was the only dairy product manufactured in that country in which an increase did not occur in this quarter. Canadian cheese production in the final 3 months of 1948 dropped 35 percent below comparable 1947. Monthly output throughout 1948 lagged behind the corresponding period of 1947, due largely to the diversion of milk supplies to more remunerative outlets. Production for the year as a whole was only 72 percent of 1947 production.

Canned milk production in the fourth quarter of 1948 showed the smallest increase of any manufactured dairy product, output in this period being approximately 5 percent above that of a year ago. Production in Canada continued at a high level, and in the quarter under review was 20 percent above the corresponding quarter of 1947. This increase occurred mainly in the production of evaporated whole milk, which also is manufactured there in far greater quantity than any other type of canned milk. For the year as a whole, production of all canned milk in Canada ran 18 percent ahead of 1947.

The final quarter of 1948 also saw an increase in the manufacture of canned milk in the Netherlands, output there being 169 percent over the same quarter a year ago. Production for the year was 72 percent higher than 1947.

Other countries reporting increases in output in the fourth quarter were France, the United Kingdom, and Australia, with the annual output in each country likewise being well above that of 1947.

Production in the United States, the heaviest producer of this manufactured dairy product, dropped about 2 percent in the last three months of 1948, compared with the same 3 months of 1947. For the entire year 1948, output of all canned milk in the United States was approximately 1 percent below last year's level.

Dried milk production in the October-December period of 1948 was 21 percent higher than in comparable 1947. The greatest increase was registered in Canada, where output was up 41 percent. Production for the year showed a gain of approximately 17 percent. Total dried milk output in the United States in the fourth quarter of 1948 increased 28 percent over the same quarter of 1947. Although the quantity of dried whole milk manufactured in this period showed a considerable decline, that of non-fat solids, which constitute the greater portion of this country's dried milk manufacture, showed an increase in this quarter of about 46 percent. For 1948 as a whole, production of all dried milk in the United States was down about 1 percent.

In the Netherlands, fourth quarter output of dried milk exceeded that of the same quarter of 1947 by 39 percent. Production for the entire 12 months of 1948 increased about 55 percent over 1947, and was only 4 percent below prewar production.

The only other countries in which increased occurred in the closing quarter of 1948 were France and Australia, output being 39 percent higher in the former, 20 percent higher in the latter. Production for the year in each country also was well above that for 1947.

In the United Kingdom, dried milk production in the last three months of 1948 was 59 percent below the same 3 months of 1947. For the entire 12 months of 1948, however, output was much higher than that of the earlier year, the lower production of the last half of 1948 being more than offset by the heavy manufacture of the first half of the year.

Current Conditions Abroad:-Buenos Aires- The summer flush in total milk production was slow in developing in Argentina as a result of a lack of rainfall in the northern provinces. During January and February, substantial rain fell and pastures quickly revived. Most pastures at present are in good condition.

Sydney:- The outlook for dairy production in Australia in the first half of 1949 is generally good. Dairy cattle numbers show a slight increase and are in sound condition. In the main dairying areas, pastures are good for this time of year, and reserves of fodder have been built up from the satisfactory harvests of the last two seasons.

Wellington.- Many parts of New Zealand have had but little rainfall in the past few weeks. The effect of this has already been felt in these areas.

Copenhagen.- Denmark is looking forward to increased milk production in 1949. Farmers, encouraged by the abundant domestic harvest of fodder roots and the increased availability of oilcakes under ECA financing, began rebuilding their herds in the last six months of 1948, and it is expected that a sizable increase in the number of milk animals will be seen this spring. In addition, the winter has been mild and pastures are reported to be in excellent condition.

Paris.- The milk supply in France is improving rapidly. Protein and other feeds are fully adequate for the present.

London.- The increase in milk production in the United Kingdom which has taken place recently has been due largely to farmers' efforts to increase the number of cows in the dairy herds and to improve yields per cow as a result of better breeding and management. The weather has been very favorable and has helped to simplify the winter feeding problem, while at the same time causing a substantial increase in yield per cow.

1948 WORLD HAZELNUT PRODUCTION ESTIMATE LOWER 1/

The 1948 preliminary estimate of hazelnut production in Italy, Spain, Turkey and the United States, the leading commercial producing countries, is 104,400 short tons unshelled basis, compared with 112,200 tons in 1947 and 164,450 tons in 1946.

The preliminary estimate is 8 percent below the 5-year (1942-46) average of 113,518 tons and about 1 percent below the 10-year (1937-46) average of 105,745 tons. The crop in Spain turned out to be considerably smaller than indicated early in the season. The adverse weather during the summer was responsible for the heavy drop. This also was true in Turkey, while in Italy and the United States the crop actually turned out to be a little larger than the forecast. It is much too early to forecast the 1949 production. A very heavy snow is reported to have fallen in southern Italy and Sicily early in March which is said to have caused a 50 percent loss in the latter country.

The 1948-49 export season to date has been about as expected early last fall. Italy and Spain have been able to export relatively small tonnages so far this season. Turkey, with the most attractive prices in the Mediterranean Basin, has done very well and the general feeling in the trade is that the entire crop will be sold before new-crop nuts arrive on the market this fall. The price of Turkish shelled hazelnuts has been so low that no other country could compete effectively in that field. Official export statistics are not available for the Mediterranean countries. However, on the basis of trade estimates, 37,000 tons, unshelled basis, have been exported to mid-season. This is about 35 percent of the estimated 1948 harvest.

The British Government on March 7 placed hazelnuts on open general license, and this may result in some trade activity for the balance of the season. However, taking the Mediterranean Basin as a whole, a very heavy carry-over apparently is to be expected. The use of hazelnuts for oil so far has been confined to Spain and Turkey. The high price of olive oil in the former country has made such operations profitable. In the latter, the carry-over from 1947 and low-grade nuts from 1948 is being diverted to oil crushers. The continued absence of Germany from the nut markets has brought about the large surpluses in the Mediterranean Basin.

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

Hazelnuts, unshelled: Estimated production in specified countries, 1948, with comparisons. (Foreign production rounded to nearest 100 short tons.)

Year	Italy	Spain	Turkey	Mediterranean Basin total	United States unshelled	World total
<u>Short tons</u>						
Average:						
1942-46..	23,900	22,300	61,000	107,200	6,318	113,518
1937-46..	21,500	23,900	55,400	100,800	4,945	105,745
Annual:						
1930.....	17,000	10,500	66,000	93,500	300	93,800
1931.....	26,000	24,000	37,000	87,000	420	87,420
1932.....	40,000	35,000	56,000	131,000	490	131,490
1933.....	5,500	14,000	54,000	73,500	1,070	74,570
1934.....	26,000	38,000	35,500	99,500	1,210	100,710
1935.....	18,000	24,000	71,000	113,000	1,240	114,240
1936.....	37,000	26,000	68,000	131,000	2,100	133,100
1937.....	26,000	32,000	77,000	135,000	2,570	137,570
1938.....	17,000	28,000	28,600	73,600	2,440	76,040
1939.....	22,000	24,200	82,500	128,700	3,890	132,590
1940.....	19,600	22,000	27,500	69,100	3,210	72,310
1941.....	10,700	20,900	33,000	64,600	5,750	70,350
1942.....	19,100	19,800	68,800	107,700	4,270	111,970
1943.....	15,400	17,600	60,500	93,500	7,030	100,530
1944.....	21,300	38,000	52,800	112,100	6,520	118,620
1945.....	15,700	18,000	33,000	66,700	5,320	72,020
1946.....	47,800	18,200	90,000	156,000	8,450	164,450
1947 1/2..	9,900	33,000	60,500	103,400	8,800	112,200
1948 1/2..	26,400	15,500	55,000	96,900	7,540	104,440

1/ Preliminary

2/ Revised

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. foreign service officers, results of office research and other information.

UNITED STATES: Imports, for consumption, of shelled and unshelled hazelnuts from specified countries, 1947-48, with comparisons

(Crop year basis, September-August)

Year	Italy	Spain	Turkey	Other countries	Total
<u>Short tons</u>					
<u>SHELLED</u>					
Average:					
1942-46	62	352	2,437	37	2,888
1937-46	93	201	1,492	36	1,822
Annual:					
1943-44	0	559	17	0	576
1944-45	0	1,191	2,989	0	4,180
1945-46	178	6	4,231	180	4,595
1946-47	133	1	4,921	5	5,060
1947-48	39	0	2,398	11	2,448
1948-49 ^{a/}	27	0	1,791	28	1,846
<u>UNSHELLED</u>					
Average:					
1942-46	392	62	2	0	456
1937-46	318	32	1	1	352
Annual:					
1943-44	0	6	0	0	6
1944-45	0	16	0	0	16
1945-46	361	220	8	0	589
1946-47	1,600	69	0	0	1,669
1947-48	3	0	0	0	3
1948-49 ^{a/}	13	0	0	0	13

^{a/} 5 months, September through January

Compiled from official records of the Bureau of the Census

At mid-season, it was estimated about 43,700 short tons unshelled basis remained from the 1948 harvest. Turkey, it is estimated, had 17,000 tons, Spain 15,700 tons and Italy 11,000 tons. The carry-over represents about 42 percent of the estimated 1948 harvest. The estimated carry-over and exports represent about 77 percent of the harvest, which indicates about 10,200 tons were utilized in domestic channels. The carry-over may, however, include some hazelnuts from previous years. The practice of growers in these countries of holding their hazelnuts until in actual need of cash has made it difficult to obtain reasonably accurate stock estimates.

United States imports of shelled hazelnuts from Turkey have been relatively heavy and have dominated the United States market for shelled nuts, since United States growers cannot produce hazelnuts and deliver them shelled in New York at 32 to 34 cents per pound. Italian exporters also have been unable to compete in the United States market, although importers have brought in 27 tons. The Spanish prices are considerably higher and as a result no shelled Spanish hazelnuts have been imported.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS AND FEEDS

EUROPEAN WINTER GRAIN CROP OUTLOOK

A review of latest available information on the winter breadgrain situation in Europe indicates that official acreage goals (particularly of wheat) in many countries were unduly optimistic and will not be fully met. While the information is not conclusive for all areas, present indications suggest that the acreage of winter wheat seeded in the fall of 1948 for harvest in 1949 may be somewhat less than that of a year ago. It is yet too early for definite indications of prospective yields, but it seems reasonable to expect--on the basis of the season to mid-March--that the very good yields per acre obtained in most areas in 1948 will not be repeated this year.

The indicated decrease in the acreage of winter wheat in some areas, particularly in Portugal and in southeastern Europe reflects unfavorable weather conditions during the fall seeding period. In other areas the decrease from a year ago is partly the result of relatively more favorable returns from other grains and from livestock. Countries in which a decline from the 1948 level of winter wheat acreage is reported include the United Kingdom, Eire, Portugal, Sweden, Yugoslavia, and Greece. It is also reported tentatively that the acreage of winter wheat in Bulgaria and Rumania may not reach the 1948 level. Increases are reported for the Low Countries, Denmark, Poland,

and Hungary. The acreage of winter wheat in France and Italy is reported to be approximately the same as in 1948.

The total acreage of wheat for harvest in Europe in 1949 will depend, of course, upon weather conditions this spring and the extent to which the seeding of spring wheat will offset the decline in winter wheat acreage. Reports indicate that intensive campaigns will be made in some areas to increase spring plantings. The effect of an increase in spring wheat acreage is expected to be limited, however, since winter wheat usually accounts for more than 90 percent of the total wheat area. Furthermore, the effect on total production of wheat is also expected to be limited, since spring varieties are generally lower-yielding than winter wheat in Europe.

In general, the winter has been open and mild with precipitation below average in most areas. In western Europe and parts of central Europe, however, the condition of winter wheat is reported to be satisfactory despite moisture deficiencies. The effects of dry weather are apparently most unfavorable in Spain and Portugal, and in south-eastern Europe. Latest reports indicate, however, that rather general precipitation during early March has provided at least temporary relief in most areas.

In the Soviet Union the acreage planted in the fall of 1948 to winter grains (winter wheat and winter rye), increased by approximately 7,000,000 acres, or 8 percent, compared with the acreage seeded in the fall of 1947 for the 1948 harvest. The winter wheat acreage in the Ukraine increased by approximately 1,600,000 acres. There was little snow in a number of central and western regions, but the winter was mild and winter-killing probably not above the average. The lack of snow, however, may affect adversely the 1949 moisture supply in a number of regions.

BURMAN RICE STOCKS DECLINE AT PORTS

Burma's 1948-49 rice crop since February 1 has been reaching ports at the rate of only 35 million pounds a month as a result of the civil war, according to information received from Rangoon. These reduced arrivals at ports compare with an average of nearly 350 million pounds exported a month during the first half of 1948. Rangoon continues to be virtually isolated from rural areas and the early restoration of transport service to that port appears unlikely.

Rice exports from Burma during the first quarter of 1949 were above those of the preceding months as a result of the transportation to ports late in December of some stocks remaining from the 1947-48 crop. January and February deliveries amounted to 217 and 417 million pounds, respectively, and March exports were expected to approximate 330 million pounds, the amount of the stocks reported to be on hand on February 28 in the 4 rice-shipping ports.

Negotiations between the Government of Burma and the British Ministry of Food regarding the future price of rice were deadlocked during February. The Government of Burma requested the payment of 50 pounds sterling per long ton (\$9.00 per 100 pounds). On March 1, the expiration date of the Ministry's rice contracts for shipment to India, Ceylon, and Malaya, the Government of Burma agreed to continue the price of 38 pounds sterling (\$6.84 per 100 pounds) until June 30.

U.S. RICE EXPORTS HEAVY IN JANUARY

United States rice exports during January amounted to 92 million pounds compared with 147 million in December, and with 31 million pounds in January a year earlier. The principal destinations in the Western Hemisphere were Cuba and Canada. Other countries to which rice was exported were the Netherlands Indies, Saudi Arabia (7 million pounds), Japan (2 million pounds) and Liberia (2 million pounds).

RICE: United States exports to specified countries, January 1949, with comparisons 1/

Continent and country	: August-July :1937-38:	: August-January : : to :1947-48:	: August-January : :1947-48:	: January : :1948-49:	: January : :1948 :	: January : :1949 :
	:1941-42:	:	: 2/ :	:	:	: 2/ :
	:Million:	:Million:	:Million:	:Million:	:Million:	:Million:
	:pounds :	:pounds :	:pounds :	:pounds :	:pounds :	:pounds :
Europe.....	43 :	22 :	2 :	16 :	1 :	3/
Cuba.....	275 :	527 :	378 :	338 :	2 :	61
Canada.....	19 :	54 :	41 :	28 :	1 :	9
Br. West Indies...	3/ :	11 :	5 :	3 :	3 :	3/
China.....	4/ :	203 :	18 :	12 :	18 :	0
Korea.....	4/ :	54 :	10 :	4 :	3/ :	0
Netherlands Indies:	4/ :	1 :	1 :	71 :	1 :	8
Other countries...	21 :	23 :	12 :	28 :	5 :	14
Total.....	358 :	895 :	467 :	500 :	31 :	92

1/ Milled rice, including brown, broken, screenings, and brewers' rice, and rough rice converted to terms of milled at 65 percent. 2/ Preliminary.
3/ Less than 500,000 pounds. 4/ If any, included in "other countries."

Compiled from official records, Bureau of the Census.

COTTON AND OTHER FIBERCOTTON-PRICE QUOTATIONS
ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the
U.S. gulf-port average

Market location, kind, and quality	Date 1949	Unit of weight	Unit of currency	Price in foreign currency	Equivalen U.S. cent. per pound
<u>Alexandria</u>		:Kantar	:	:	:
Ashmouni, Good.....	3-24	: 99.05 lbs.	: Tallari	: 47.00	: 39.22
Ashmouni, F.G.F.....	"	: "	: "	: 44.75	: 37.34
Karnak, Good.....	"	: "	: "	: 72.75	: 60.70
Karnak, F.G.F....	"	: "	: "	: 65.75	: 54.86
<u>Bombay</u>		:Candy	:	:	:
Jarila, Fine.....	"	: 784 lbs.	: Rupee	: 620.00	: 23.86
Broach, Fine.....	"	: "	: "	: 650.00	: 25.01
Kampala, East African.....	"	: "	: "	(not available)	
<u>Karachi</u>		:Maund	:	:	:
4F Punjab, S.G., Fine.....	3-23	: 82.28 lbs.	: "	: 87.00	: 31.90
289F Sind, S.G., Fine.....	"	: "	: "	: 96.00	: 35.20
289F Punjab, S.G., Fine....	"	: "	: "	: 98.00	: 35.93
<u>Buenos Aires</u>		:Metric ton	:	:	:
Type B.....	3-24	: 2204.6 lbs.	: Peso	: 3350.00	: 45.24
<u>Lima</u>		:Sp. quintal	:	:	:
Tanguis, Type 5.....	3-23	: 101.4 lbs.	: Sol	(not quoted)	
Pima, Type 1.....	"	: "	: "	(not available)	
<u>Recife</u>		:Arroba	:	:	:
Mata, Type 4.....	3-24	: 33.07 lbs.	: Cruzeiro	: 215.00	: 35.37
Sertao, Type 5.....	"	: "	: "	: 205.00	: 33.73
<u>Sao Paulo</u>		:	:	:	:
Sao Paulo, Type 5.....	"	: "	: "	: 200.00	: 32.90
<u>Torreon</u>		:Sp. quintal	:	:	:
Middling, 15/16".....	"	: 101.4 lbs.	: Peso	: 192.00	: 27.18
<u>Houston-Galveston-New</u>		:	:	:	:
Orleans av. Mid. 15/16"....	"	:Pound	:Cent	: XXXXX	: 32.47

Quotations of foreign markets reported by cable from U.S. Foreign Service posts abroad. U.S. quotations from designated spot markets.

U. K. RAW COTTON COMMISSION
STATEMENT ON BUYING DIFFICULTIES

A recent statement by the British Raw Cotton Commission regarding difficulties in the purchase of types and qualities of cotton required for the special need of British spinners illustrates the nature of such difficulties now being experienced by most cotton importing countries.

In its statement, the Commission cited certain conditions in international trade over which it has no control and which would have to be faced by British importers, whether Governmental or private.

There is no shortage of cotton in the United Kingdom as in many other European countries as stocks are still equal to 7 months' supply and imports are now being maintained at the consumption level. The difficulty is in maintaining a continuity of supply of the particular qualities of cotton required for the production of a wide variety of yarns and cloth. The industry has shown considerable apprehension as to the effect on its competitive position in world textile markets if textile quality cannot be maintained due to lack of proper grades.

The Raw Cotton Commission's statement setting forth its position with regard to each cotton exporting country follows:

"UNITED STATES: Import purchases of American cotton are now almost entirely dependent on the aid granted under the European Recovery Plan. The Economic Cooperation Administration issues procurement authorizations at quarterly intervals, enabling the Commission to purchase cotton up to a stipulated amount of dollars. The amount is based on an assessment of United Kingdom's minimum needs after taking into consideration actual stocks and prospective imports of cotton from other countries. The quantity obtained with the number of dollars authorized depends on the quality bought. The ECA requires each participating country to take a fixed percentage of low grade, spotted or coloured cotton regardless of whether these are wanted by the mills of the country concerned.

"BRAZIL: The quantity of cotton available to the United Kingdom is determined annually in accordance with inter-Governmental trade agreements. At present the Commission can only make forward purchases in anticipation of an exchange quota for 1949. As the Bank of Brazil is unwilling to buy forward sterling, only a limited business is possible.

"PERU: The new Peruvian foreign exchange regulations are making it extremely difficult for shippers to make forward offers. Under these regulations, only 45 percent of the sterling proceeds of export sales is immediately negotiable at the official rate of exchange, while the remaining 55 percent must be held for 60 days or sold in the "free" market to importers into Peru who require sterling to effect payment. Shippers are therefore faced with the hazard of wide fluctuations in the "free" exchange rate until a buyer of sterling is forthcoming.

"ARGENTINA: Owing to the partial failures of recent crops, which have not fully sufficed to satisfy the increasing requirements of the domestic mills, the Argentine Government has refused to permit the sale of any cotton for export.

"INDIA: The 1948-49 Indian crop was disappointingly small and quite inadequate to meet the needs of the domestic mills in other than the shorter-stapled varieties. The Government of India has therefore prohibited the export of all the better-stapled qualities, which are Lancashire's principal requirement.

"PAKISTAN: Hindus formerly owned most of the ginneries in what is now Pakistan and handled the bulk of the business. The communal riots, or fear of them, led to the ginneries being deserted. Now the Pakistan Government has granted the United Kingdom a quota of only 100,000 bales out of the current crop and has insisted that a good percentage of purchases should be made from Moslem shippers with little or no experience of the trade. The quality of the crop is reported to be rather inferior due to inefficient ginning, and prices are relatively high because of the large quota allocated to India and the re-entry of Japan as a competitive buyer.

"EGYPT: Purchases are limited to the amount of sterling allotted by the Treasury and are dependent on trade talks now proceeding.

"ANGLO-EGYPTIAN SUDAN: This year the Sudan Government has allocated only 60 percent of the crop to the United Kingdom, whereas last year this country secured virtually the whole production. Although production promises to be moderately larger than in 1948, the quantity available to Lancashire will not suffice to meet the present rate of United Kingdom's consumption.

"BRITISH EAST AFRICA: Out of the total indicated 1949 production of around 400,000 bales (of 400 pounds) only about 100,000 bales have been allocated to the United Kingdom.

"BELGIAN CONGO: The Belgian currency is almost as hard as that of the United States, and the quantity bought must be related to balances of sterling between the two countries.

"RUSSIA: The 1948-49 Russian crop was so deficient that Russia has had to import substantial quantities of raw cotton in recent months to keep her domestic mills and those in Eastern Europe operating.

"MEXICO: Purchases of this growth have had to be greatly restricted, as dollar payment is required, and Mexican cotton cannot come within the scope of ECA.

"Apart from the Dominions, protectorates, and colonies in which supply is the chief difficulty, other cotton-producing countries such as Iran, Iraq, and Turkey have made it extremely difficult to make purchases, mainly because their prices are too high.

"Competition from other countries which have small ERP allocations and need cotton at any price has forced prices in the Eastern countries to a level at which the Commission could not import without either sustaining heavy losses or making the selling price prohibitive."

DROP IN BELGIAN COTTON CONSUMPTION

The Belgian cotton textile industry has experienced a substantial decline in production from the high level of activity attained in the early part of 1948, according to Jerome T. Gaspard, Agricultural Attache, American Embassy, Brussels.

Cotton consumption in Belgium in the November-January quarter of the current season was reported at 88,781 bales or a 21 percent decline from the postwar high of 113,100 bales in the February-April quarter of 1948. This would be at an annual rate of 355,000 bales. Trade reports on yarn production indicate that cotton consumption did not increase in January or February of 1949. To reach the estimated consumption of 375,000 bales during the 1948/49 season there must be a reversal of the downward trend of the past few months. Consumption during the 1947-48 season was reported at 421,000 bales.

Some of the causes given for the drop in consumption are the saturation of the domestic market and the shortage of Belgian francs among the traditional importers of Belgian cotton textiles. During 1948, due to payment difficulties, numerous countries were forced to reduce their imports of cotton textiles. Exports of cotton textiles from Belgium declined from a monthly average of 4.3 million pounds in the first quarter of 1948 to 3.6 million pounds per month in the fourth quarter of last year. In January of 1949 exports declined still further to 1.0 million pounds.

Imports of raw cotton into Belgium have been increasing and stocks have increased. On January 31, 1949, cotton stocks in mills were reported at 98,647 bales or equal to slightly more than 3 months' supply. Although Belgium is not using ECA funds for the procurement of United States cotton, imports from this country have been substantial and are increasing. In the first 6 months of the current season (beginning August 1) Belgium imported 58,000 bales of United States cotton out of a total of 158,000 bales. In January the Belgians imported 42,000 bales of cotton of which 60 percent or 25,000 bales were from the United States.

Supplies of cotton in India, Brazil, and Peru are short and Belgium must rely on the United States and the Belgian Congo as the principal sources of imports until the new crop becomes available in the Southern Hemisphere. However, the Belgian Congo can supply only about 25 percent of Belgium's raw cotton requirements and therefore they must rely heavily on United States cotton supplies in the next few months.

COTTON EXPORTS FROM
BRAZIL AT LOW LEVEL

Exports of cotton from Brazil during the 4 months October-January 1948-49 averaged only 55,000 bales monthly as surplus stocks neared exhaustion and prices rose above a competitive level on foreign markets. Exports of 639,000 bales (of 500 pounds gross) during the 6 months ended January 31, 1949 were 28 percent more than the 498,000 exported during a similar period a year ago.

The export volume was high in August 1948, amounting to 254,000 bales but dropped in September to 164,000 and averaged only 55,000 in the next 4 months. Preliminary figures indicate a total of less than 50,000 for February. This trend may be reversed in April and later months as the new crop in south Brazil begins to reach the market in March. The 1948-49 crop in Sao Paulo, however, is estimated at only 965,000 bales which is somewhat below normal and will not provide a large surplus for export this year.

BRAZIL: Exports of cotton by countries, average 1934-38,
annual 1945-47, August-January 1947-48 and 1948-49
(Bales of 500 pounds gross)

Country	Average	Year beginning August 1				Aug.-Jan.	
	1934-38	1945	1946	1947	1947-48	1948-49	1/
	1,000	1,000	1,000	1,000	1,000	1,000	
	bales	bales	bales	bales	bales	bales	
United Kingdom:	230.7	503.1	410.2	147.4	48.7	207.5	
Germany.....	331.2	0	0	1.7	2/	1.1	
France.....	92.1	0	115.8	61.0	33.4	68.6	
Belgium.....	34.2	72.7	123.6	136.6	70.2	19.0	
Netherlands....	31.1	56.4	54.7	91.2	59.8	8.1	
Italy.....	38.5	201.0	202.3	119.3	25.4	21.4	
Poland.....	17.3	0	60.3	64.7	35.4	57.1	
Portugal.....	20.7	5.8	5.7	14.7	8.2	21.6	
Spain.....	2.2	146.8	146.8	161.2	93.8	108.9	
Sweden.....	4.9	59.0	46.6	33.4	15.1	20.8	
Finland.....	-	7.1	20.3	8.2	7.0	1.4	
Norway.....	-	8.8	6.0	8.6	5.0	0	
Japan.....	200.2	0	0	0	0	2.3	
China.....	50.1	264.6	106.4	24.8	3.1	1.1	
United States..	4.4	3/ 7.5	3/ 4.1	3/ 3.2	3/ 2.3	2/	
Canada.....	.2	23.3	19.7	36.3	22.8	1.5	
Colombia.....	.1	10.9	42.0	18.6	11.1	8.0	
Chile.....	-	0	11.2	16.9	8.8	10.4	
Cuba.....	-	6.1	5.0	4.6	0	4.7	
Uruguay.....	-	3.4	7.4	12.1	1.8	3.4	
Australia.....	-	14.6	34.2	21.0	15.7	4.5	
Other countries:	7.2	70.6	94.9	63.6	30.2	67.5	
Total.....	1,065.1	1,461.7	1,517.2	1,049.1	497.8	638.9	

1/ Preliminary. 2/ Less than 500 bales. 3/ Largely cotton for transshipment to Canada.

Compiled from Comercio Exterior do Brazil and Servico Estadistica Economica o Financeira do Teouro Nacional, Ministry of Finance.

Brazilian cotton mills will need at least 800,000 bales of the 1948-49 crop, estimated at 1,400,000 bales. With stocks currently at a low level the surplus available for export in 1949 can hardly exceed 700,000 bales or an average of about 60,000 bales a month. Exportation of this quantity would deplete stocks in Brazil to a minimum working-stock level by the time the new crop arrived in south Brazil in 1950.

U.S. COTTON EXPORTS AT POSTWAR PEAK

Exports of cotton from the United States during January 1949 amounted to 417,000 bales (of 500 pounds gross weight) making a total of 1,983,000 bales for the 6 months ended January 31, 1949, compared with 942,000 bales for a similar period a year ago. Exports since August 1, 1948, rose rapidly from 119,000 bales in August to 551,000 in December, then declined to 417,000 in January. This trend was in direct contrast with that in Brazil during the same period when exports dropped from 254,000 bales in August to 47,000 in January.

Nearly two-thirds of the cotton exported from the United States during the 6 months under review was financed under the European Recovery Program. A large part of the remainder was shipped to areas under military occupation to be paid for after processing and sale of the cotton goods. Demand for United States cotton is still strong in practically all importing countries, stocks are moderately low, prices are relatively low, and supplies of competing growths are no longer plentiful. The only major barrier to retard a heavy volume of cotton exports from the United States this year and possibly next year is the scarcity in practically all foreign countries, of dollar exchange available for importation of cotton. This is being overcome to a large extent by the funds allocated under the ERP program for cotton exports to countries eligible for such funds.

UNITED STATES: Exports of cotton by countries of destination
average 1934-38, annual 1945-47, Aug-Jan. 1947-48 and 1948-49

(Bales of 500 pounds gross)

Country	Average	Year beginning August 1				Aug.-Jan.	
	1934- 1938	1945	1946	1947		1947-48	1948-49
	<u>bales</u>	<u>bales</u>	<u>bales</u>	<u>bales</u>		<u>bales</u>	<u>bales</u>
Austria.....	0:	0	4	3:		0:	18
Belgium-Luxembourg...	147:	75	182	53:		37:	80
Czechoslovakia.....	65:	70	101	22:		0:	<u>1/</u>
Denmark.....	35:	0	0	3:		0:	15
Finland.....	35:	17	23	27:		11:	19
France.....	589:	793	393	216:		78:	245
Germany.....	579:	6	200	232:		54:	279
Greece.....	2:	31	10	1:		1:	2
Italy.....	430:	515	460	70:		22:	321
Netherlands.....	86:	48	116	35:		25:	90
Norway.....	13:	1	5	3:		2:	7
Poland and Danzig....	224:	104	49	50:		16:	58
Spain.....	101:	161	42	3:		0:	12
Sweden.....	93:	2	23	6:		5:	<u>1/</u>
Switzerland.....	2:	27	20	3:		2:	31
United Kingdom.....	1,097:	296	486	272:		170:	242
Yugoslavia.....	10:	94	61	0:		0:	18
Other Europe.....	<u>2/</u> 85:	4	0	1:		0:	7
Total Europe.....	3,593:	2,244	2,175	1,000:		423:	1,444
Canada.....	261:	321	320	138:		85:	140
Chile.....	<u>3/</u> :	0	0	<u>1/</u> :		0:	31
Colombia.....	17:	0	1	1:		0:	21
Cuba.....	7:	6	34	13:		10:	1
India.....	44:	<u>1/</u>	0	21:		0:	3
China.....	55:	719	569	303:		7:	96
Japan.....	1,271:	365	511	466:		379:	217
French Indo-China....	<u>3/</u> :	3	6	4:		4:	4
Korea.....	<u>3/</u> :	0	0	59:		23:	0
Australia.....	5:	13	9	11:		11:	0
Other countries.....	43:	7	17	9:		0:	26
Total.....	5,296:	3,678	3,642	2,025:		942:	1,983

1/ Less than 500 bales. 2/ Includes 39 Portugal, 23 Soviet Union. 3/ If any, included in other countries.

Compiled from official records of the Bureau of the Census.

FATS AND OILSU. S. SOYBEAN AND
SOYBEAN-OIL EXPORTS

The following table shows United States exports of soybeans and soybean oil during 1948 with comparisons:

UNITED STATES: Soybean and soybean-oil exports,
1948 with comparisons

Country of destination	Refined soybean oil:			Soybeans		
	Average			Average		
	:1935-39- : pounds	:1947 ² / ₃ - : pounds	:1948 ² / ₃ - : pounds	:1937-39 ⁴ / ₅ - : bushels	:1947 ² / ₃ / ₅ - : bushels	:1948 ³ / ₅ - : bushels
North America:						
Canada.....	152	7,976	5,581	1,197	1,304	1,549
Cuba.....	3,833	9,157	8,062	6/	1	6/
Other.....	935	2,702	1,647	62	-	-
South America.....	301	2,662	1,776	6/	-	6/
Europe:						
Austria.....	-	1,369	10,263	-	196	1
Belgium and Luxembourg.....	-	15,917	8,973	15	-	979
Czechoslovakia.....	-	2,076	-	-	-	-
Denmark.....	-	7,817	6,263	606	-	202
Eire.....	-	16	-	-	-	-
Finland.....	131	3,406	690	18	-	-
France.....	-	20,686	4,960	86	95	1,386
Germany.....	-	9	15,090	26	307	272
Greece.....	-	21	-	-	-	-
Iceland.....	23	489	619	-	-	6/
Italy.....	4	36	484	6/	-	4
Malta, Gozo, and Cyprus.....	-	4,982	-	-	-	-
Netherlands.....	-	9,332	1,650	2,006	-	484
Norway.....	35	35	-	113	259	-
Poland and Danzig.....	-	1,670	18	-	-	-
Portugal.....	-	7	-	-	-	-
Rumania.....	-	-	32	-	-	-
Sweden.....	211	27	10	604	-	6/
Switzerland.....	100	8,510	3,594	-	-	1
Trieste.....	-	-	200	-	-	-
United Kingdom.....	2	1,269	6,392	59	-	-
Asia.....	7/ 55	1,805	2,635	6/	343	1,618
Oceania.....	42	538	73	6/	-	-
Africa.....	7/ 643	660	1,517	1	-	1
Total.....	6,467	103,174	80,529	4,793	2,505	6,497

²/ Not separately classified in Foreign Commerce and Navigation. ²/ Including crude in terms of refined. ³/ Preliminary. ⁴/ Not separately classified prior to January 1, 1937. ⁵/ Revised to include Army civilian supplies. ⁶/ Less than 500 bushels. ⁷/ Revised.

INDONESIAN COPRA EXPORTS IN FEBRUARY
HIGHER THAN IN FEBRUARY 1948 ^{1/}

Copra exports from Indonesia in February amounted to only 20,300 long tons. This was nearly 40 percent greater than the total shipped in February 1948. In comparison with the export of 33,200 tons in the preceding month, however, shipments were lower by almost two-fifths.

The Netherlands was sent 17,800 long tons, or upwards of 85 percent, of the total quantity exported. Belgium was shipped 2,000 tons with the balance of 500 tons going to Switzerland.

The Copra Board announced another decrease in the price of copra effective March 1. The decrease, 4 gulden per 100 kilograms (\$15.28 per long ton) was applicable to all grades of copra. The new price schedule, revising the one effective one month before, is as follows: 35 gulden per 100 kilograms (\$134 per long ton) for sun-dried; 33 gulden (\$126) for mixed; and 30 gulden (\$115) for inferior grade.

INDONESIA: Copra exports, February 1949 with comparisons
(Long tons)

Country	Copra distribution				
	Average:	1948 ^{1/}	Jan-Feb.:	February	
	1935-39:		1949 ^{1/}	1948 ^{1/}	1949 ^{1/}
Canada.....	-	8,320	-	-	-
Mexico.....	12,614:	-	-	-	-
United States.....	3,909:	5,734	-	-	-
Belgium.....	8,053:	8,018	2,000:	-	2,000
Czechoslovakia.....	4,896:	2,000	-	-	-
Denmark.....	72,375:	4,120	-	-	-
France.....	12,748:	5,937	-	2,000	-
Bizonal Germany.....	64,674:	19,578	-	-	-
Italy.....	23,103:	-	-	-	-
Netherlands.....	133,941:	159,440	48,058:	12,626	17,835
Norway.....	31,810:	3,000	-	-	-
Poland.....	1,422:	2,500	-	-	-
Sweden.....	6,886:	11,670	-	-	-
Switzerland.....	17:	6,500	500:	-	500
Japan.....	6,180:	-	3,000:	-	-
Singapore.....	107,285:	-	-	-	-
Union of South Africa...	-	1,600	-	-	-
Others.....	17,572:	-	-	-	-
Total.....	507,385:2/	238,417	53,558:2/	14,626	20,335

^{1/} Preliminary.

^{2/} Does not include unrecorded shipments to Singapore.

Copra Board, Batavia, Java

^{1/} A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

FRENCH OLIVE OIL PRODUCTION LESS THAN HALF OF POSTWAR AVERAGE

Olive oil production for 1948-49 in metropolitan France is estimated at about 2,750 short tons. Postwar production there has ranged from 5,500 to 7,500 tons annually. Of this year's total, approximately 2,200 tons will be used as edible oil and 550 tons will be channeled into industrial uses, chiefly soap manufacturing. The reasons for the poor output this year, are the following: the alternate-bearing nature of olive trees, the freeze of February 20, 1948 which killed many of the buds, rains which hindered pollination during the flowering period, and several infestations of the olive fruit fly.

Approximately 12,000 tons of olive oil were imported into France in 1948. Of this quantity 11,000 tons were brought from Spain during October and November under the terms of the Franco-Spanish Trade Agreement of 1948. The remaining 1,000 tons were imported from Greece, Italy and Algeria.

Prospects for imports of olive oil in 1949 are very poor. Production in the entire Mediterranean area, with the exception of Tunisia, is small and will be needed for consumption in each of the respective producing countries. Tunisia, in all probability, will export only to countries offering hard currencies.

The French Government has refrained from requisitioning, or otherwise controlling, the supply of olive oil owing to this year's small olive crop. Consequently, sellers and prospective buyers may negotiate for oil under conditions of a free market. The retail price of olive oil has fallen from around 950 francs (\$3.58) to a current 650 francs (\$2.45) per kilogram (2.2 pounds) and was expected soon to go down to as low as 500 francs (\$1.89). This price decline reflects the general lowering of retail food prices in France, as well as considerable buyers' resistance to the former high prices for olive oil.

It is believed, too, that the announcement of the distribution of the imported Spanish oil in 1949 has forced hoarded stocks into the open market.

ALGERIA REPORTS 1948-49 OLIVE OIL PRODUCTION

Algerian olive oil production in 1948-49, according to the American Consul, Algiers, is estimated to be 10,000 short tons. Of this output from 6,500 to 8,500 tons will be commercialized, since the producers, mostly native, always retain oil for their own needs and market the surplus. Domestic requirements were estimated to be 12,000 tons in 1948.

The great difference between the price of olive oil and that of other edible vegetable oils, especially peanut, moved the Algerian

Government to permit the export of as much as 30 percent of the oil produced from the previous year's olive crop.

Government-controlled stocks in Algeria, as of December 31, 1948, consisted of 1,513 tons of olive oil. On the same date of the preceding year there was no olive oil in storage. There were 621 tons exported in 1948. Most of this went to France, the United Kingdom and the United States.

The production, sale, trade, and storage of olive oil currently are subject to strict government control in Algeria. Supplies of edible oils in general, however, have so increased that despite rationing, olive oil is readily available in producing areas at less than the legally fixed price. It seems likely, therefore, that rationing and, perhaps, price controls on olive oil will be removed in near future.

LEBANON EXPANDS OILSEED PRODUCTION AND PROCESSING

Lebanon is expected to continue to increase gradually the production of most types of vegetable oilseeds and to expand oil-processing facilities in 1949. Although oilseed production probably will be limited always by the small area of arable land, the current stage of industrialization in Lebanon indicates that that country may become an important oil-processing center in the Near East.

Small quantities of sesame seed, peanuts, and flaxseed are produced in Lebanon. In 1948 slightly more than 1,000 short tons of sesame seed were produced from 3,700 acres. An area equally as great is planted for 1949. Peanut production exceeded 700 tons in 1948. This was an increase of 10 percent over the previous year's outturn. Approximately 2,800 bushels of flaxseed were harvested in 1948, about the quantity produced in 1947.

Indigenous production comprises a relatively insignificant part of the total supplies used by the Lebanon processing industry. Most of the oilseeds are obtained from India, Iraq, Cyprus, Transjordan and Egypt.

Unofficial estimates of vegetable oil production in 1948 compared with 1947 (in parentheses) are as follows: coconut, 2,600 short tons (1,600); cottonseed, 440 (220); linseed, 660 (330); sunflower seed, 110 (110); sesame seed, 55 (55); and tehini 2,000 (2,000). Lebanon had five firms manufacturing vegetable oils. Recently two new firms were to have started processing.

Sesame seed is processed both into sesame oil and into "tehini", the local name for a paste used largely in the manufacture of confections. Almost the entire supply of raw materials for other oils is imported. No peanut oil is produced since the domestic supply of peanuts is consumed locally as nuts.

Vegetable-oil consumption in Lebanon has averaged about 2,800 tons the last two years. Some Lebanese vegetable oils and oilseeds are exported but the quantities are not available since statistics combine the foreign trade of Lebanon and Syria.

The wholesale price of sesame seed on the Beirut market on February 11 ranged from 1,500 to 1,800 Lebanese pounds per metric ton (\$407 to \$489 per short ton). Recent prices for other oilseeds have not been reported.

TROPICAL PRODUCTS

BRAZIL'S 1948 COFFEE EXPORTS SECOND HIGHEST IN HISTORY

Brazil's 1948 coffee exports of 17,492,000 bags are only slightly below the country's record exports of 17,851,000 bags in 1931, according to the American Embassy in Rio de Janeiro. Exports in 1947 totaled 14,830,000 bags, in 1946 15,505,000 bags, and the annual average during the prewar years 1935-39 was 15,095,000 bags.

Coffee exports in 1948 to all areas were the highest since prewar years. Exports to the United States in 1948 were 20 percent above 1947 and 40 percent above the 1935-39 annual average. Exports to Europe in 1948 were 11 percent higher than in 1947 but were 30 percent lower than in the prewar years 1935-39.

About 67 percent of Brazil's 1948 exports went to the United States, as compared with 66 percent in 1947 and the annual average, 1935-39, of 55 percent. In 1948, Brazil supplied about 55 percent of all the coffee imported into the United States as compared with 53 percent in 1947 and the annual prewar average of 60 percent. Next to the United States, the leading countries importing Brazilian coffee in 1948 were Belgium with 1,073,000 bags, the United Kingdom with 1,027,000 bags, and Argentina with 702,000 bags.

BRAZIL: 1948 exports of green coffee, with comparisons

Destination	: Average : 1935-39	: 1946	: 1947 1/	: 1948 2/
	: 1,000	: 1,000	: 1,000	: 1,000
	: <u>bags</u>	: <u>bags</u>	: <u>bags</u>	: <u>bags</u>
United States.....	8,333	10,947	9,745	11,721
Other Western Hemisphere:	479	1,055	1,109	1,257
Europe.....	5,676	2,994	3,570	3,976
Africa.....	509	279	253	291
Asia and Oceania.....	98	230	153	247
Total.....	15,095	15,505	14,830	17,492

1/ Revised. 2/ Preliminary.

Source: Comercio Exterior do Brazil and foreign service reports.

The value of Brazil's 1948 coffee exports is reported at 8.9 billion cruzeiros (\$489,000,000). This substantially exceeds the dollar value of coffee exports in any previous year and compares with an annual average value of \$137,898,000 for the prewar period 1935-39.

Prices of Brazilian coffee during the past year have been set largely by supply and demand. There were no government systems of guaranteed or minimum prices, export subsidies, or marketing quotas in effect during 1948. The only government control affecting the marketing of coffee was the limitation of port stocks. This control which has been in effect for some time is for the purpose of insuring orderly movements of coffee, and is not believed to have affected 1948 export prices.

GOLD COAST'S CACAO PRODUCTION THREATENED BY SWOLLEN-SHOOT

Swollen-shoot disease has been spreading rapidly in the Gold Coast of Africa for several years and is a threat to the cacao industry. A report recently issued by a group of United Nations' scientists appointed as a Commission of Enquiry into the Swollen-Shoot Disease in the Gold Coast states that the disease is "no minor foray, but a full scale invasion which has already left the choicest cocoa-producing land devastated and derelict." In effect, the report states that unless prompt and effective measures are taken to control the disease, Gold Coast cacao production will end within 20 years. Prior to the investigations by the United Nations' Commission of Enquiry, the Gold Coast Department of Agriculture through the Research Institute at Tafo had made a careful study of the situation and had arrived at the same conclusions.

Swollen-shoot is a virus complex characterized by the swelling of the young shoots, mottled and often malformed leaves, systemic necrosis, and defoliation. The virus causing the disease is present in all parts of a diseased tree. The mealy bug is a carrier of the disease, and the insect is nurtured and carried by ants. When it feeds on a diseased tree it picks up the virus and if the insect moves quickly to a healthy tree, that tree becomes infected. The only practice now being followed to protect healthy trees is to remove all diseased cacao trees and certain wild forest trees which become infected with the disease.

It is reported that over 50 million cacao trees already have been infected and that an additional 15 million trees are infected each year. The Gold Coast Government introduced an eradication program through the destruction of diseased trees but had to abandon it about a year ago because of opposition from farmers and elements in the local trade. Since then, cutting out of diseased trees has been strictly on a voluntary basis. Rates of compensation paid to farmers for trees destroyed, Government aid in rehabilitation, and an educational program are helping to quiet the political agitation against the program. It is not progressing rapidly, however, and the United Nations' scientists consider that immediate action on a huge scale is imperative.

The Gold Coast is by far the World's largest cacao producer, supplying from 35 to 40 percent of all cacao beans entering world trade. The 1948-49 forecast of the largest production since prewar years has created some apathy regarding the disease. There is no justification for it, however, as the large crop resulted from exceptionally favorable conditions, which cannot be relied on to occur again simultaneously. These conditions included almost perfect weather for the crop, an unexpectedly good yield from diseased but still surviving trees, production on a limited scale from trees now coming into bearing, and the generally better care of producing trees which has been encouraged by high cacao prices.

TOBACCO

PHILIPPINE TOBACCO PRODUCTION INCREASES; FOREIGN TRADE RESTRICTED

Philippine leaf tobacco production for the 1948-49 season is unofficially estimated at about 55 million pounds, according to the American Embassy in Manila. This compares with 38 million pounds harvested from the 1947-48 crop and with a prewar average crop of about 75 million pounds annually.

Exports of leaf from the Philippines for the first 11 months of 1948 totaled 6.1 million pounds, of which 4.7 million were destined to Spain--the principal market for Philippine leaf. Most of the remainder went to Belgium, China, and Indo-China. Prewar, 1935-39, exports of leaf from the Philippines averaged 37 million pounds annually. Exports of manufactured tobacco products in 1948 were negligible.

Imports of leaf into the Philippines for the first 11 months of last year totaled 88,934 pounds, compared with an annual average of 1,075,000 pounds during the 1935-39 period. Practically all of the 1948 imports were of United States origin. A total of 9.9 billion cigarettes were imported during the January-November 1948 period, of which over 99 percent came from the United States. Consumer preference for American blended cigarettes has tended to restrict domestic production of cigarettes which was lower in 1948 than in 1947, but import restrictions which went into effect at the first of 1949 will probably result in increased consumption of domestically manufactured cigarettes. Philippine factories manufactured 1.8 billion cigarettes in 1948, compared with more than 3 billion in prewar years.

Imports of chewing and smoking tobacco increased in 1948, while imports of other manufactured products declined. For the period January-November 1948, imports of chewing tobacco amounted to 1,224,752 pounds, and of smoking tobacco, 443,030 pounds.

SPAIN'S TOBACCO PRODUCTION INCREASES; IMPORTS DECLINE

Spain's tobacco production increased and imports declined during 1948, according to the American Embassy in Madrid. Tobacco production in Spain totaled approximately 31 million pounds in 1948, compared with 29.2 million pounds in 1947 and an annual average of about 12 million

pounds during the prewar years 1935-39. The government is trying to improve the quality and increase the production of tobacco in Spain, and the 1948 crop is reported to be superior in quality to that of 1947.

Imports of leaf tobacco totaled 32.4 million pounds during the first 11 months of 1948, compared with 56.5 million pounds in the calendar year 1947 and 32.1 million pounds in 1946. Brazil and Cuba have supplied about 75 percent of total leaf tobacco imports during the past three years. Other countries supplying Spain with significant quantities of leaf during this period have been the Philippine Republic, Dominican Republic, and the United States. Imports of leaf tobacco from the United States totaled slightly over one-half million pounds in the first eleven months of 1948. Imports from the United States in recent years have been insignificant in comparison with the average annual import of over 9 million pounds prior to 1936.

JAVA AND SUMATRA CIGAR LEAF PRODUCTION HIGHER

The 1948-49 harvests in Java and Sumatra of principal export types of cigar leaf are larger than in any year since the Japanese invaded the Islands early in the war, according to the American Consulate in Batavia. Provisional estimates place the 1948-49 production of Sumatra cigar wrapper, at about 7 million pounds, and Besoeki cigar filler and binder, produced in eastern Java, at about 5.5 million pounds. The production of Vorstenlanden cigar leaf in Java is reported to be negligible. Prior to the war the annual production of Sumatra wrapper was about 30 million pounds, Besoeki about 30 million pounds, and Vorstenlanden about 22 million pounds.

Following the Japanese occupation of the Islands in 1942 the production of export types of tobacco practically ceased. Many of the plantations were looted by the Japanese and the land was planted to rice and other food crops. Since the Japanese surrender in 1945 guerrilla activity on the Islands has brought further destruction and prevented extensive plantings. Because of these factors it will take some time to restore the tobacco plantations to their prewar production.

FLUE-CURED AND BURLEY PRODUCTION INCREASING IN VENEZUELA; IMPORTS INCREASED

Consumer demand for United States type blended cigarettes has resulted in increased production of flue-cured and Burley leaf in Venezuela, and a large increase in imports of United States leaf and cigarettes. The country's total production of flue-cured tobacco for 1948-49 is estimated at 1,800,000 pounds from about 2,040 acres, according to the American Embassy in Caracas.

Burley production is estimated at 838,000 pounds from about 1,175 acres. This is reported to be a considerable increase over production of these types in any previous year. Almost 60 percent of Venezuela's tobacco areas of about 5,800 acres was planted to these two types in 1948-49 as compared to less than 20 percent prior to 1944-45.

The increased production of light cigarette tobaccos has been brought about through the efforts of the two domestic cigarette manufacturers. These companies give the growers four-year contracts, build curing barns, furnish implements, fertilizer, seed, and a guaranteed price. In addition, the companies have employed technicians from the United States skilled in tobacco growing. They have maintained close supervision of all plantings in which their respective organizations have a financial investment. It is reported that one company is considering supplying growers with well-developed plants from company seed beds, as there have been a number of plant bed failures which resulted in costly delays in getting the crop started.

Domestic demand for cigarettes and other tobacco products exceeds leaf production. Consequently, Venezuela must import considerable quantities of leaf and cigarettes which have come principally from the United States. In the first 11 months of 1948 Venezuela imported through regular trade channels about 249,000 pounds of leaf tobacco and about 730,000,000 cigarettes. In addition, trade sources estimate that about as many cigarettes are smuggled into the country as enter by regular channels. In the prewar period, 1935-39, Venezuela imported about 150,000,000 cigarettes and about 4,900 pounds of leaf tobacco annually. Imports of other tobacco products have always been negligible.

LIVESTOCK AND ANIMAL PRODUCTS

UNITED KINGDOM REDUCES MEAT RATION

The British Ministry of Food, according to a recent report, has announced that effective March 27, the meat ration is again reduced. The carcass meat ration was established at 10 pence (16.8 cents) January 23, 1949. Recent announcement, however, indicates that the carcass meat portion will now be reduced to 8 pence (13.4 cents) and canned corned beef is being held at 2 pence (3.4 cents).

Argentina's failure to meet deliveries under the Andes (U.K.-Argentina) Agreement is given as the reason for reducing the carcass meat ration. Of 123,200,000 pounds of meat promised for the January-February 1949 period, only 103,700,000 pounds were delivered. Apparently, at the end of the Andes Agreement year, about one-quarter of the carcass meat commitments remained unshipped, necessitating heavy withdrawal from stocks.

L A T E N E W S

On March 7 the British Government placed on open general license the importation of chestnuts and walnuts unshelled from France; chestnuts, hazelnuts and walnuts unshelled from Italy, almonds, chestnuts and hazelnuts, unshelled from Spain, and hazelnuts unshelled from Turkey.

- - - - -

The heavy snow which fell in Southern Italy and Sicily early this month is reported to have reduced almond crop prospects in the Bari district by about 20 percent and in Sicily by about 50 percent. No damage to hazelnuts in the Naples-Avellino district was reported but it is estimated 50 percent of the Sicilian hazelnut crop will be lost as a result. These estimates of damage are preliminary.

- - - - -

The International Bureau for Whaling Statistics has announced that Antarctic whaling operations, conducted in accordance with the provisions of the International Whaling agreement, would cease at midnight March 26, 1949. Prospects that the limit of 16,000 blue-whale units would be caught this season were good, since more than 14,000 units had been caught through the week ending March 12. The season just closed, of nearly 15 weeks duration, was opened officially December 15.

- - - - -

A complete ban was placed on cotton exports from India except to hard currency countries according to an official announcement on March 16.

- - - - -

A commercial and payments accord between Egypt and Hungary, signed February 26, 1949, undertakes to facilitate the exchange of Egyptian cotton, cotton yarn, flax yarn, raw wool, phosphates and medicinal herbs for manufactured goods from Hungary. The accord is in effect for 1 year renewal by mutual agreement. Import and export permits during this period will not be required for trade between the two countries. Trade, however, will be presumably within stipulated maximum limits for quantities involved. Prices were established but were not announced.

- - - - -

The 4th official estimates places the 1948-49 cotton crop in the State of Sao Paulo, Brazil at 965,000 bales (of 500 pounds gross) or 20,000 bales less than the last previous estimate. Production estimates for other states in Brazil have not been changed recently. The 1948-49 estimate for Brazil is now placed at 1,400,000 bales compared with 1,223,000 for 1947-48.

- - - - -

The cotton and cottonseed export tax in the Anglo-Egyptian Sudan was increased on January 15, 1949 from 5 percent to 10 percent ad valorem.

- - - - -

